



FY23 Grant Administration Workshop

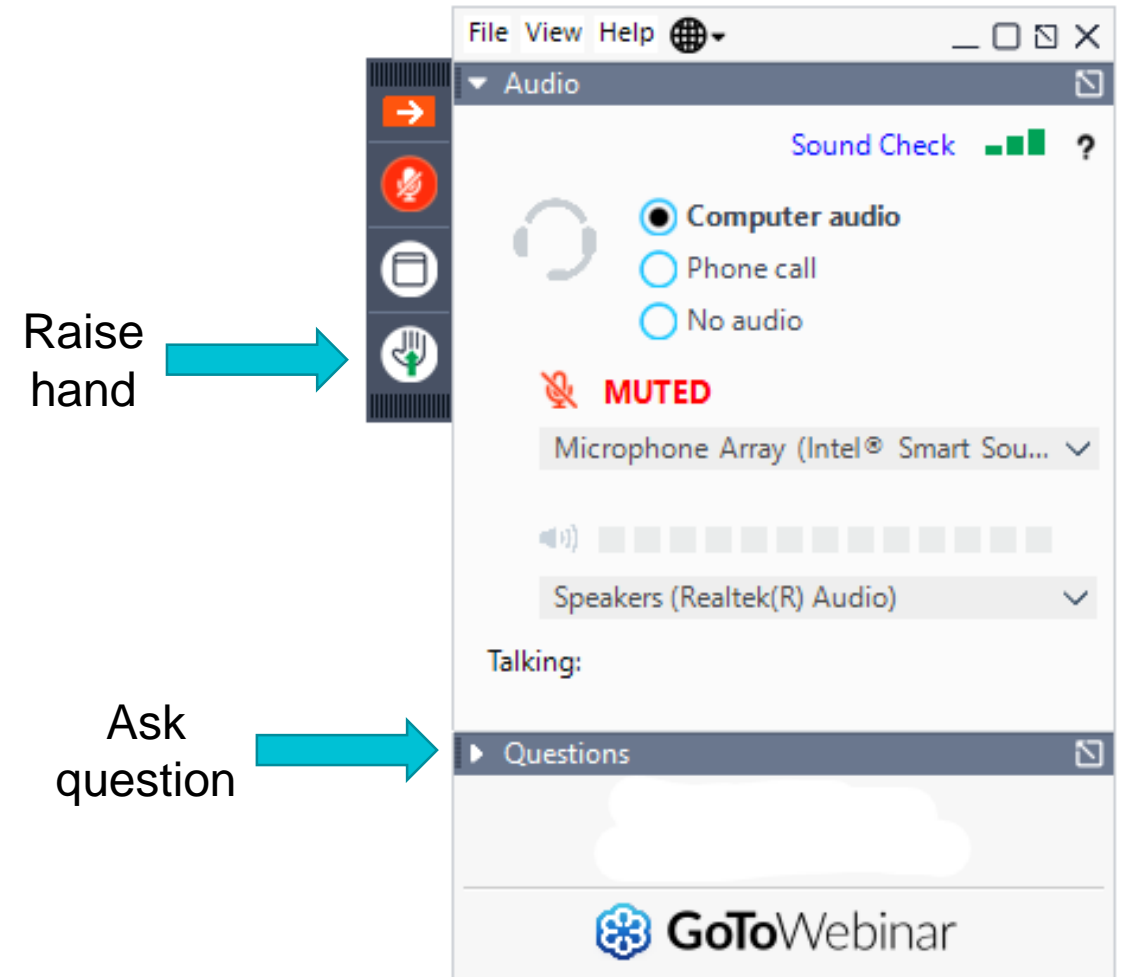
July 20, 2022



Webinar Instructions

- To ask a question:
 - Use the raise hand function OR
 - Click on the drop-down arrow next to 'Questions' and type your question into the box
- To unmute:
 - The webinar organizer will unmute you if your hand is raised

This meeting is recorded and will be posted on DRPT's YouTube



Agenda

1. CAP Grant Funding Approval
2. Development and Execution of Grant Agreements
3. OLGA Users and Maintenance
4. Grant Administration Procedures Document (Purple Book)
5. Training Assistance
6. Grant Reimbursements
7. Grant Monitoring
8. Performance Measurements
9. Project Budget and Scope Change Requests
10. Project Time Extension Requests
11. Grant Close-Out
12. Wrap Up - Assistance - Questions

CAP Grant Funding Approval

CAP Grant Funding Approval

Key Steps for State Funding

- **February 1st:** Grant applications are due
- **April:** DRPT prepares Six-Year Improvement Program (SYIP) recommendations to Commonwealth Transportation Board (April 19) - open for comments
- **June:** Commonwealth Transportation Board (CTB) approves the SYIP (June 21)

CAP Grant Funding Approval

Key Steps for Federal Funds with State Match

- If federal funding is FHWA funding (CMAQ or RSTP), ***grant recipient*** must ensure funding is in TIP/STIP
- If federal funding is flexed, the ***grant recipient*** will start an application with the FTA, and notify DRPT Programming and Program Managers that the federal funds are ready to be transferred (flexed)
- DRPT Programming Manager will confirm with the FTA before sending the flex request to VDOT for processing
- Once FTA approves application, ***grant recipient*** must notify DRPT Programming and Program Managers

Development & Execution of Grant Agreements

Development & Execution of Grant Agreements

Key Steps

- June: DRPT prepares project agreements for state funded projects
- State match agreements for Federal funding written after Federal authorization or FTA award
- DRPT internal review by Program Manager, Section Manager, Division Chief, and Finance Division
- DRPT releases agreement to the grant recipient through OLGA (July for state funded; Sept/Oct. for federally funded)
- Grant recipient review and sign-off in OLGA
- Final execution by DRPT Director or CFO

Development & Execution of Grant Agreements

- **The person signing in OLGA must have agency authorization to do so!**
- **If the person signing is not the CEO/director, DRPT requires a letter authorizing someone else to sign.**

Development & Execution of Grant Agreements

- Read the entire agreement, including the appendices
- Appendix 2 contains the detailed budget
- For Federal funded projects, there is a Federal and state agreement
- Project scope
- Total funding amount and local match amount
- Line item budget category amounts
- Start and End Dates
- Proper parties identified
- Keep a copy of the signed agreement

Key Grant Agreement Stipulations

- Obtain approval from the Department before developing and implementing marketing campaigns, marketing materials, social media messages, incentives, contests, and challenges.
- Partner with the Department on all Department led marketing promotions and campaigns.
- Provide monthly, quarterly, and annual project reports as required or requested by the Department.

Scope of Work - CAP Operating

- A. Eliminate and reduce single occupant vehicle (SOV) auto trips by shifting SOV trips to carpool, vanpool, bicycle, and transit.
- B. Provide ridematching services through the matching of commuters with their travel options by entering commuters in the Commuter Connections or Commute!VA/Agile Mile ridematching system.
- C. Encourage the public to enter their commute information into the Commuter Connections or Commute!VA/Agile Mile ridematching system and obtain information on their commute options.
- D. Promote the use of carpooling, vanpooling, transit, and the applicable guaranteed/emergency ride home program; and bicycle commuting.
- E. Provide reports and data as required by the Department.

Scope of Work - Employer Outreach

- A. Conduct calls and meetings with decision makers at employers in the Grantee's service area and obtain the status of employer provided transit benefits, vanpool benefits, telework program, and any other employee commute assistance.
- B. Conduct sales calls and meetings to create new employer provided transit and vanpool benefit programs.
- C. Record all calls and meetings and the topics and outcomes of the calls and meetings in a Department approved customer relations management system.
- D. Record the status of transit benefits, vanpool benefits, telework, and all other employer provided employee commute assistance in the ACT! Database system provided by the Metropolitan Washington Council of Governments.
- E. Provide reports and data as required by the Department.

OLGA Users and Maintenance

OLGA Users and Maintenance

- OLGA Master User must be a current employee
- If not, contact DRPT update the Master User
- Every agency should have at least two current OLGA users (master user can add/remove)
- No user is permitted to use another's login credentials
- Update agency contact information
- Staff can be listed as contacts to receive email notifications without having to have an OLGA account
- Make sure Organization Type, Size, and Service Category are correct.

Grant Administration Procedures



Find the **Purple Book** on **OLGA**
under **News & Information**

Questions and Answers

Training Assistance

RTAP and Small Urban Scholarships

- DRPT administers two training scholarships:
 - FTA Rural Transit Assistance Program (RTAP)
 - State-funded Small Urban Transit Program
- These grant/scholarships can be used to attend training, seminars, workshops, and conferences.
- All RTAP and Small Urban training requests must be submitted through OLGA as an application.
- Approved RTAP grants will be reimbursed up to 100% of eligible expenses.
- Approved Small Urban training grants will be reimbursed up to 95% of eligible expenses.



Questions and Answers

Grant Reimbursements

General Grant Reimbursement Information

Frequency

- Monthly? Quarterly?

Submission of Final Reimbursement Request

- 90 calendar days
- Check box in OLGA

What expenses are reimbursable?

- Refer to the Blue Book
- Contract/Appendix 1&2/Scope of Work
- When in doubt - contact us!

Budget Line Items

- Are not to be exceeded

Purple Book

Expense Summary Sheet

- The Summary Sheet should be the first or second page after the OLGA generated invoice
- Please use our format!
- Include corresponding line item for each expense
- Splitting an expense

Clipboard: Cut, Copy, Paste, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Left, Center, Right, Indent, Wrap Text, Merge & Center

Number: General, Currency, Percentage, Decimals

Styles: Normal, Good, Bad, Neutral

Cells: Insert, Delete, Format

A11: 4

	A	B	C	D	E	F	G	H	I
1	Grantee:								
2	Program Coordinator:								
3	Reimbursement Month/Quarter:								
4	Reporting Start Date:								
5	Reporting End Date:								
6									
7	Sequence/Doc #	Invoice Date	Invoice #	Invoice Amount	Amount Charged to Program	Vendor	Description	DRPT Grant Expense Category	Notes
8	1	7/31/2020	123456	7,865.18	7,865.18	N/A	Payroll for Staff	Salaries & Wages	Must include a detailed list of staff names and activity worked on (see attachment #1). Also, must include payroll sheet from payroll program, not an excel spreadsheet.
9	2	7/31/2020	98765	1,711.00	1,711.00	N/A	Total Fringe	Fringe	Must include a detailed list of staff names and fringe rate
10	3	11/27/2020	169955515	9,498.26	23.58	Verizon	Office phones	Communication Services	Office line for Marketing Coordinator
11	4	7/16/2020	1234	7.00	7.00	USPS	Postage for GRH letters	Supplies & Materials	Mailed 7/20/2020 - sample of mailing attached in OLGA
12	5	7/28/2020	4321	1,500.00	1,000.00	Welcoming Websites	Website Redesign	Professional Services	This expense is split between this project and project 71423-05 reimbursement request #123456 for \$500
13				Total	\$ 10,606.76				

Supporting Documentation

All expenses in the reimbursement request need back up or supporting documentation

- Requirements
 - Personnel - actual work performed by each staff person
 - Direct Costs - legible, informative invoices
 - Include samples of any creative designs
 - (e.g. brochure, webpage, poster, etc)

Other Reimbursement Reminders

Travel

- Plans for travel must be in Appendix 2/Scope of Work,
- Precheck required before any funds are spent
- Must use GSA Rates
- Going over GSA rates?

Purple Book

- Valuable resources for details on how to manage grants

Uploading into OLGA

- There is a 10 MB limit for attachments. When possible .pdf documents

Contract Appendix 2/Scope of Work

- Check often and use as your guide when charging grant

Questions and Answers

Grant Monitoring

Grant Monitoring

- Monthly meetings with your DRPT Program Manager
- Monitor your total and line item expenses
 - Increase in the amount of DRPT grant funds is not permitted under the CAP grant program
 - May not exceed line item budget amounts as show in contract.
 - No transfer of funds between line items without written approval from DRPT - failure to obtain pre-approval may result in denial of reimbursement of additional expenses for that line item, even if the total budget is not exceeded.
- All grant recipient staff that will be managing, working on, incurring/authorizing expenses, and invoicing for the program/project should read the agreement. The agreement contains approved project details, eligible expenses, line item budgets, and total budget that may be different than the original application.

Performance Measures

Performance Measurements

DRPT requires grant recipients to report on various performance measures on a monthly, quarterly, and annual basis.

- CAP Operating
- Employer Outreach/Service Project Reporting
- Vanpool Project Reporting

These measurements are highly important as they:

- Shows results;
- Shows what the Commonwealth is getting for their investment;
- Provide a basis for goal setting;
- Enable accountability;
- Clarify expectations; and
- Improve decision making.

All of these reports are due to DRPT within 30 days of the end of the reporting month.

Ridematching Data

CAP Operating

- New rideshare matches attempted.
- New rideshare matches attempted that found matches.
- Successful follow ups made.
- Total number of active commuters in the ridematching database.
- New guaranteed ride home registrants.
- Guaranteed ride home trips taken.

<i>Method of Travel</i>	<i>Tally</i>	<i>Frequency</i>
Walk		9
Bike		3
Car		6
Bus		12
TOTAL		30

Ridematching Data

Commuter Connections Members



Data Source - Commuter Connections Ridematching system

- Generate your monthly report from the above listed system
- Send DRPT the a printout of the reports as they are needed when DRPT conducts data verification
- Commuter Connections network members must send their monthly report to their DRPT program manager so the data can be verified for using the quarterly reports generated by the Metropolitan Washington Council of Governments
- Network members will be required to revise data as necessary to meet COG's quarterly number

Ridematching Data

Commuter Connections Members



Run a report each month from your Commuter Connections Ridematching system

- new applicants
- re-applicants

Ridematching Data

Data Source - Commute!VA ridematching and reward system (Agile Mile)

- Run the report for the previous month for your region
- Save as a PDF and send to your CAP program manager
- Keep a copy of the PDF of the monthly reports generated - it may be needed when DRPT conducts data verification
- DRPT will verify data for Commute!VA partners using the quarterly reports generated by Agile Mile



Ridematching Data - Sample Agile Mile Report

- New rideshare matches attempted.
- New rideshare matches attempted that found matches.
- Total number of active commuters in the ridematching database.

DURING THE PERIOD		
New members	276	(77% prev. dr. alone)
Active members	1,188	(49% prev. dr. alone)
Deleted accounts	41	

RIDESHARE MATCHING		
Visits	32,890	visits during the specified period
Rideshare inquiries	3,188	number of inquiries submitted during the specified period
Rideshare matches (#)	2,493	number of inquiries that produced matching names during the specified period
Rideshare matches (%)	78%	percent of inquiries that produced matching names during the specified period
New rideshare participants	9	members who recorded their first rideshare trip during the specified period
Total rideshare participants	7,239	members who recorded a rideshare trip at any time

Employer Data

Employer Outreach/Service Project Reporting

- Number of employer sales calls and employer sales meetings.
- Number of New and Total Number of Level 1 employers entered into the CRM system.
- Number of New and Total Number of Level 2 employers
- Number of New and Total Number of Level 3 employers
- Number of New and Total Number of Level 4 employers
- Number of employers offering a pre-tax transit benefit.
- Number of employers offering a direct transit benefit.
- Number of employers offering a pre-tax vanpool benefit.
- Number of employers offering a direct benefit vanpool benefit.
- CAP employer outreach grant recipients are required to collect this information. Commuter Connections employer information will be found in your Act! Database or similar system
- If you are a CAP program that works with employers, but are not required to report this information, we'd like you to also collect this information as DRPT has been asked to report employer information to the General Assembly.
- A full description of the different levels can be found at (*Purple Book - Section 7.4 - Commuter Assistance Program Reporting Requirements*)

Vanpool Data

Vanpool Project Reporting

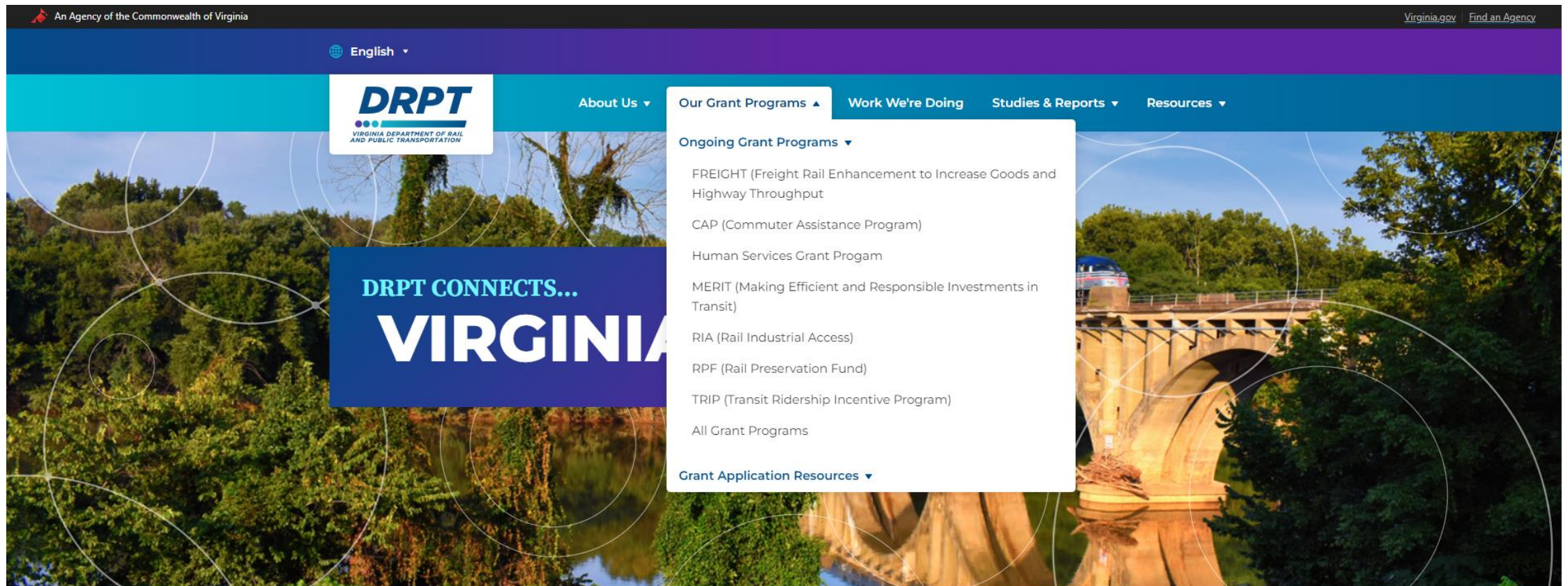
CAP projects that work with vanpool providers will be required to report the following on a monthly basis. (Submit report in an Excel spreadsheet.)

- New vanpools started
- Total number of vanpools
- Vanpool ridership
- Vanpool revenue miles (VRM)
- Vanpool passenger miles traveled (PMT)



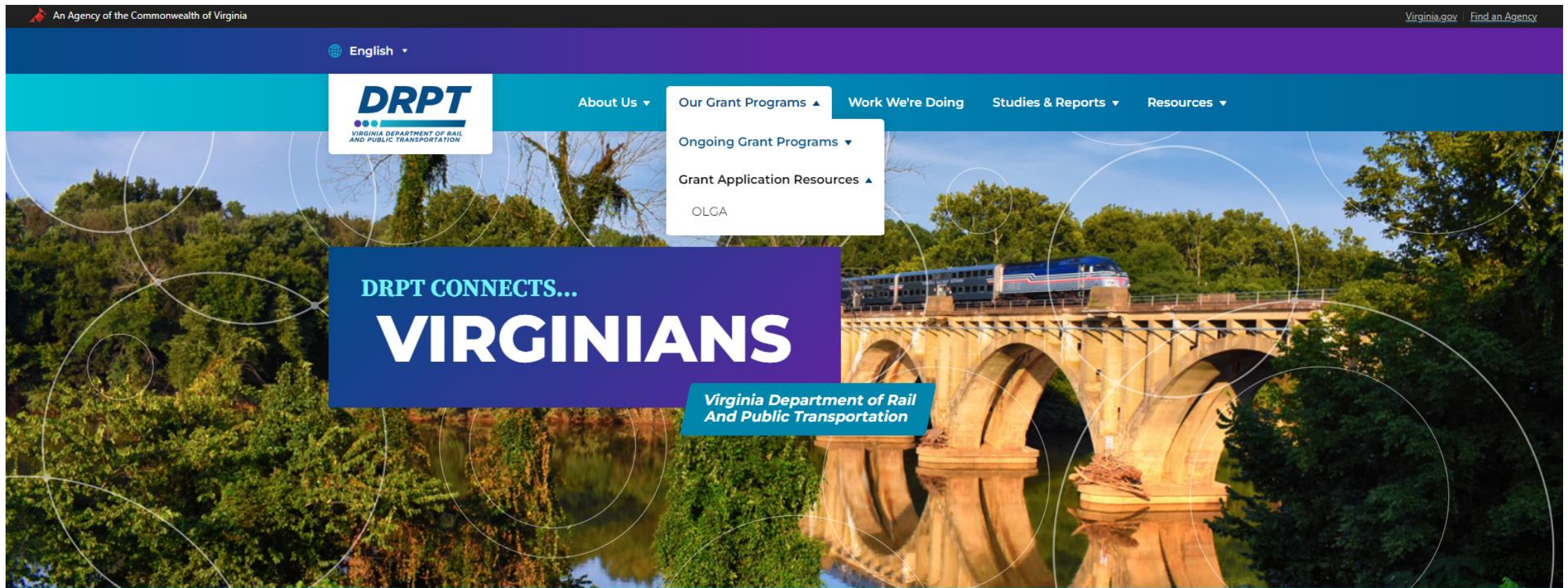
Entering Data into OLGA

DRPT's new website - Our Grant Programs



Entering Data into OLGA

Select Grant Application Resources



Entering Data into OLGA



[Home](#) ▸ [Ongoing Grant Programs](#) ▸ [OLGA](#)

What is OLGA?

OLGA is the Online Grant Administration website for DRPT. Applications for funding for all of DRPT's grant programs must be submitted through OLGA.

DRPT will not accept applications in any other manner than through OLGA. Organizations eligible to receive funding must set up an account and designate a Master User prior to submitting an application. An OLGA account can be set up at any time of the year, and it is recommended that new applicants set up an OLGA account prior to the start of the grant application period.

[OLGA Website](#) 



The screenshot shows the OLGA website interface. At the top is a blue header with the OLGA logo on the left. Below the header is a navigation menu with links: Home, Getting Started, System Requirements, News & Information, and Contact DRPT. The main content area has a 'Welcome' message and a 'Welcome to OLGA' section. Below this is a 'Existing Users Login' section with fields for 'User ID' and 'Password', a 'Login' button, and a link for 'Forgot your password?'. To the right is a 'New to OLGA?' section with instructions on how to create a new account and a link to the 'Getting Started' section. Below the login and new user sections is a 'System Requirements' section with information about supported browsers and a link to download Internet Explorer. At the bottom of the page is a 'DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION NOTICE AND WARNING' section with a disclaimer about system usage and monitoring.

OLGA

Home
Getting Started
System Requirements
News & Information
Contact DRPT

[Home > Login](#)

Welcome

Welcome to OLGA, the Online Grant Administration site for the Virginia Department of Rail & Public Transportation.

[Application Schedule & Documentation](#)

Existing Users Login

User ID:

Password:

[Forgot your password?](#)

New to OLGA?

For instructions on how to create a new account please see our [Getting Started](#) section.

System Requirements

OLGA supports IE 11 and earlier, Edge, Chrome, Safari and Opera. It will not function properly with other browsers. To download a free copy of Internet Explorer, [click here](#).

Disable your popup blocker or add this website to your approved list.

DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION
NOTICE AND WARNING

You are accessing a Commonwealth of Virginia computer system intended to allow you to apply for and manage grants. Information system usage may be monitored, recorded, and is subject to audit. Monitoring of IT systems and data may include, but is not limited to, network traffic, application and data access, keystrokes, user commands, email, internet usage, messages, and data content. Unauthorized use of this system is prohibited and is subject to criminal and civil penalties. Logging in and use of this system indicates your consent to monitoring and recording. If you do not consent to these terms, do not log in.

- Once in - Select your organization
- Open Performance Data - Transportation Demand Management
- Make sure your Organization Data is correct; make any changes if needed.
- Select - Report Month you will be entering
- Select - Enter your monthly/quarterly data

Example - Agile Mile Report

- New rideshare matches attempted.
- New rideshare matches attempted that found matches.
- Total number of active commuters in the ridematching database.

DURING THE PERIOD		
New members	276	(77% prev. dr. alone)
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Entering into OLGA

- New rideshare matches attempted - this is where the 3,188 Rideshare Inquiries; also, 2,493 would go into the New rideshare requestors who received match names.
- Select Save, then Next Step; move onto next reporting month if needed.

The screenshot displays a data entry form for OLGA. At the top, there are input fields for 'Number of Guaranteed Ride Home information requests' (0) and 'Number of general information requests' (300). Below these, the 'Total Number of requests received' is calculated as 783, with a 'Calculate' button. The form then prompts for 'Enter July 2021 totals for the following information request methods used by TDM customers:'. This section includes input fields for 'New requests received through events/fairs' (1), 'New requests received through Web sites' (0), 'New requests received through commuter stores' (0), and 'New requests received through marketing efforts' (40). Another prompt asks for 'Enter July 2021 totals for the following:'. This section includes input fields for 'New rideshare matches attempted' (3,188), 'New rideshare requestors who received match names' (2,493), 'New Guaranteed Ride Home trips' (0), 'New employers contacted through outreach programs' (3), 'New Guaranteed Ride Home registrations' (1), 'New vanpools formed' (2), 'Total new employers participating at level three' (0), and 'Total new employers participating at level four' (0). A red oval highlights the 'New rideshare matches attempted' and 'New rideshare requestors who received match names' fields. At the bottom, there are three buttons: 'Save', 'Previous Step', and 'Next Step'.

Field	Value
Number of Guaranteed Ride Home information requests	0
Number of general information requests	300
Total Number of requests received	783
Enter July 2021 totals for the following information request methods used by TDM customers:	
New requests received through events/fairs	1
New requests received through Web sites	0
New requests received through commuter stores	0
New requests received through marketing efforts	40
Enter July 2021 totals for the following:	
New rideshare matches attempted	3,188
New rideshare requestors who received match names	2,493
New Guaranteed Ride Home trips	0
New employers contacted through outreach programs	3
New Guaranteed Ride Home registrations	1
New vanpools formed	2
Total new employers participating at level three	0
Total new employers participating at level four	0

Questions and Answers

Open Data Portal

DRPT's data dashboard to display agency information, project information and results. <https://data.drpt.virginia.gov>



Open Data Portal

Performance Measures

- Transit data
- Virginia Breeze data
- Rail data
- TDM data
 - Vanpool Data
 - Number of vanpools each month
 - Vanpool ridership each month
 - Vanpool revenue miles
 - Ridematching Data
 - Number of commuters seeking ridematching/commute options

Additional Grant Administration Procedures

Budget and Scope Change Requests

- Budget and scope changes are rare and will be considered on a case-by-case basis.
- Changes that increase the total amount of the budget or DRPT's grant amount are **not** permitted.
- Monitor your line item expenses - as you do your reimbursements - at the end of each quarter relook over your application, line items, etc. to make sure you're still on track with your goals, measurements, etc.
 - Notify your DRPT Program Manager - before you exceed a line item budget, notify your program manager about the possibility of doing a budget revision.
- **Failure to obtain pre-approval from your program manager for any line item budget transferred or significantly exceeding the budget in a line item may result in denial of reimbursement of additional expenses for the line item, even if the total budget is not exceeded.**

Project Time Extensions Requests

Key Reminders

- Always allot enough time for the extension date to complete the project
- Attachments can be entered in OLGA after the Extension has been submitted
- CAP Operating Grants can not be extended
- Submit 30 days before the end date
- Extensions are closely reviewed—the more information the better!

Grant Close-Out

OLGA system automatically sends reminder email notifications to grant recipients:

- Project will expire in 60 days
- Project has expired

Grant Close-Out

- Final reimbursement request must be submitted through OLGA within 90 calendar days after the final expenditure or project end date, whichever occurs first.
- Check the box that it is the final reimbursement request.
- Complete a project deobligation through OLGA
- A deobligation is needed for all projects, even those with a zero balance

Wrap Up - Assistance - Questions

- Follow up with your respective DRPT Program Manager
 - Northern Virginia - Gabe Ortiz
 - All other areas - Kathy Molin

OLGA: <https://olga.drpt.virginia.gov>

DRPT: <https://drpt.virginia.gov/>

Open Data Portal: <https://data.drpt.virginia.gov/>